



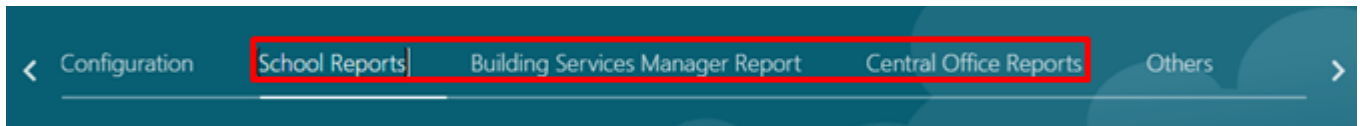
Accessing and Navigating MCPS Reports

Financial inquiry and reporting are the foundation for acquiring data and other account information in the Business Hub. Examining available funds and account balances, viewing transaction history, and running reports are all part of the financial inquiry and reporting process. A variety of reports are available to help monitor accounts. Depending on your role/position in MCPS, you may have access to one or more groups of reports: **School Reports**, **Building Services Manager Report**, or **Central Office Reports**. Your responsibilities determine your access to the report groups. In this guide, you will learn how to navigate the reports area.

Image quality in this guide may vary across devices. If images are not clear, increase your viewing size.

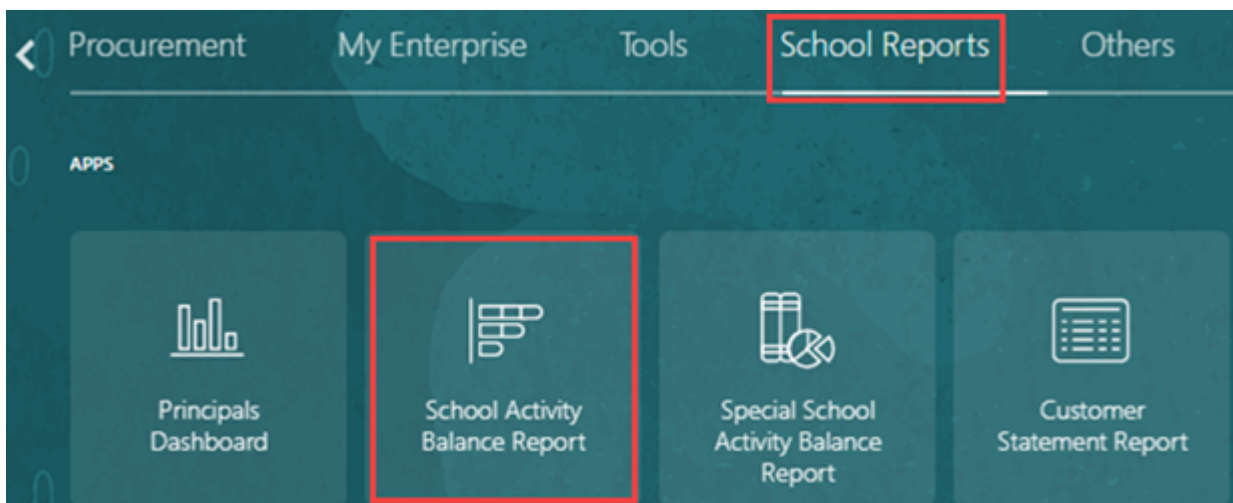
Directions

1. Many of the FMS DiscoViewer reports have been re-created in the Business Hub. Other reports will be developed and made available when finalized. Reports are grouped according to audience: **School Reports**, **Building Services Manager Report**, **Central Office Reports**. The report grouping available to you depends on your security role and level of data access. Some reports may appear in more than one group.



2. Scroll to your **Reports** group menu and select the desired report tile to run.

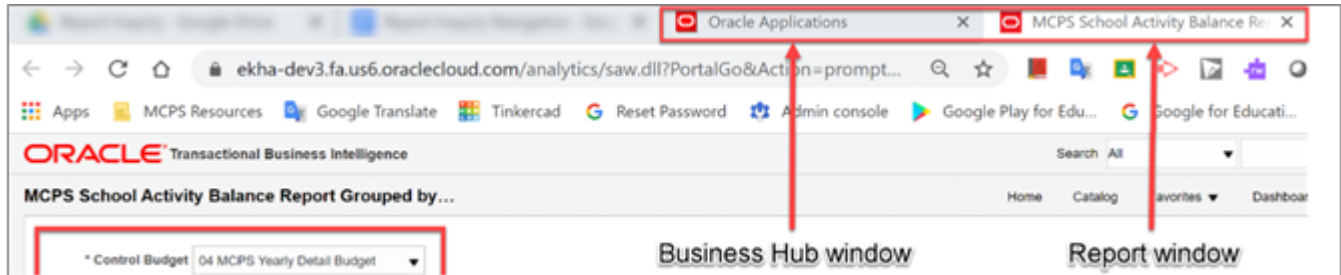
Note: Use the < > arrows to scroll through the menu, if needed.





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- The report will open in a new tab next to the Business Hub tab. Each report has its own set of required and optional parameters. Also, the layout and action of parameter fields will vary among reports.



- Enter the **parameters** that apply to your school or office and click the **OK** or **Apply** button to run the report.

Note: An asterisk (*) by a particular field indicates that it is a required field. Double asterisks (**) indicate that at least one of the ** fields is required; No asterisk indicates an optional parameter that can be used to narrow down the data.

- When done using a report, close the report window by clicking on the “X” on the report tab. This returns you to the Business Hub where you left off, with the report dashboard.

Note: Unlike Hub screens, the Reports screens are navigable by using the back arrow on your browser.





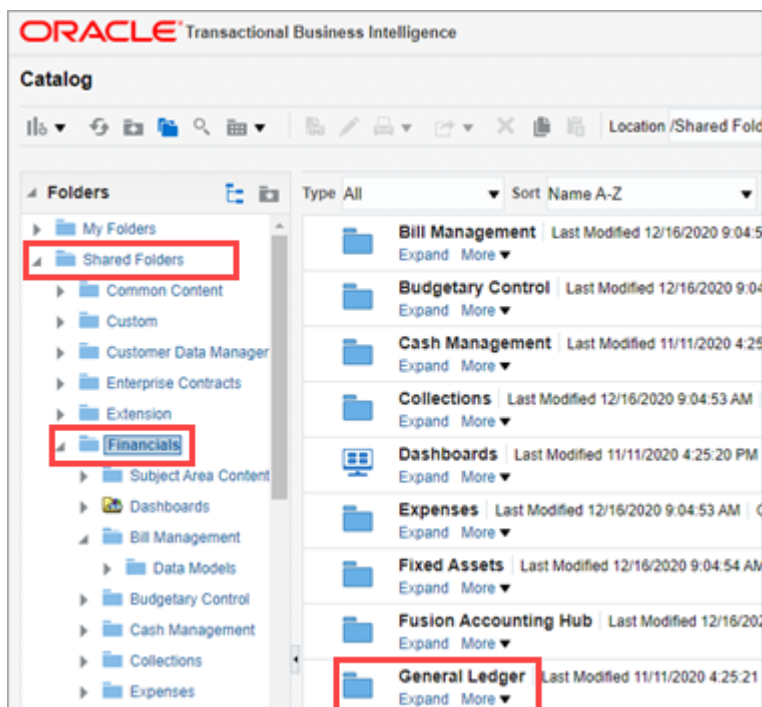
Advanced Report Search

Follow the remaining steps in this guide to locate additional reports that are not found on the Hub homepage. Subfolders stored in Shared Folders are viewable to all users, however, reports will only display data for users with the appropriate permissions. If you do not have access permission to the data in the report display, you may not see any data after running the report and a blank screen will be displayed instead.

- To locate additional reports not on the homepage, there is an advanced option. Click on the **Tools** menu, then the **Reports and Analytics** tile. On the next screen click on the **Browse Catalog** button in the upper right corner of your screen to browse other available reports.

Browse Catalog

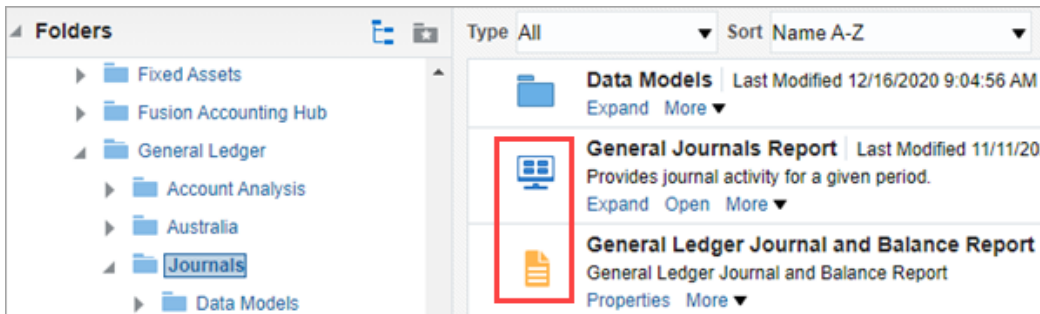
- From the **Folders** menu on the left, click **Shared Folders** to drill down for additional reports. Select a folder that contains what you are looking for, e.g., "Financials." Double click on the folder icon or report name, or choose "Expand" to reveal subfolder contents. Do not select folders titled "Data Models," as they contain structural elements used to build reports.



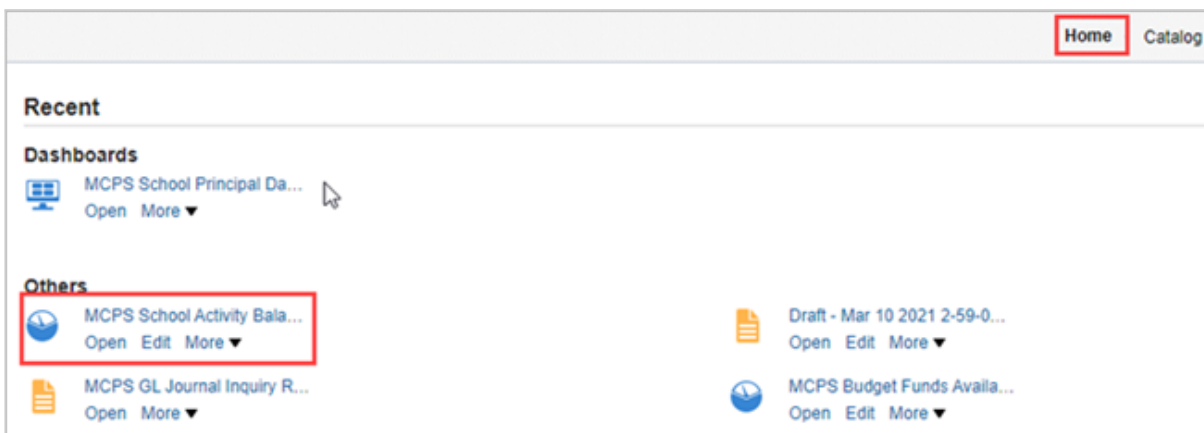
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- Explore the available reports in the sub folders. Reports are designated by various icons, which signify how the report template was created. Click the desired report to access the report parameters screen for running the report.

Note: See the individual “Report Guides” for detailed instructions to run and export specific reports.



- Another option for accessing reports is to click the **Home** button to review recently run reports. From here, click on the report name hyperlink to return to the parameters screen to run the report again.



- To exit your report, simply close the report tab on your browser by clicking the small “x” on the tab. This will return you to the Hub homepage.



Note: Your screen may differ from screenshots in these instructions, due to variations in user roles and system upgrades.